

University of Montana

## ScholarWorks at University of Montana

---

Institute for Tourism and Recreation Research  
Publications

Institute for Tourism and Recreation Research

---

7-1-2002

### Nonresident FALL Visitor Profile: A study of Fall Visitors to Montana

Norma Nickerson

*The University of Montana-Missoula*

Follow this and additional works at: [https://scholarworks.umt.edu/itr\\_pubs](https://scholarworks.umt.edu/itr_pubs)



Part of the [Leisure Studies Commons](#), [Recreation, Parks and Tourism Administration Commons](#), and the [Tourism and Travel Commons](#)

### Let us know how access to this document benefits you.

---

#### Recommended Citation

Nickerson, Norma, "Nonresident FALL Visitor Profile: A study of Fall Visitors to Montana" (2002). *Institute for Tourism and Recreation Research Publications*. 101.  
[https://scholarworks.umt.edu/itr\\_pubs/101](https://scholarworks.umt.edu/itr_pubs/101)

This Report is brought to you for free and open access by the Institute for Tourism and Recreation Research at ScholarWorks at University of Montana. It has been accepted for inclusion in Institute for Tourism and Recreation Research Publications by an authorized administrator of ScholarWorks at University of Montana. For more information, please contact [scholarworks@mso.umt.edu](mailto:scholarworks@mso.umt.edu).

**Institute for Tourism &  
Recreation Research**

School of Forestry  
32 Campus Dr. #1234  
The University of Montana  
Missoula, MT 59812

Phone (406) 243-5686  
Fax (406) 243-4845  
[www.forestry.umt.edu/itrr](http://www.forestry.umt.edu/itrr)

---

# **Nonresident *Fall* Visitor Profile**

by

Norma Nickerson, Ph.D.

Research Report 2002-8  
July 2002

Institute for Tourism & Recreation Research  
School of Forestry  
The University of Montana  
Missoula, MT 59812  
[www.forestry.umt.edu/itrr](http://www.forestry.umt.edu/itrr)

This study was funded by the Lodging Facility Use Tax

## Table of Contents

Acknowledgements	i
Executive Summary	ii
Chapter 1: Nonresident Fall Travelers to Montana: 2001	1
Introduction	1
Methodology	2
Study Population	2
Population Estimation Model	2
Survey Methodology and Response Rates	2
Chapter 2 : ALL visitors	4
Trip Satisfaction and Changes Noted by Fall Visitors	6
Demographic Characteristics of FALL Visitors: All visitors and by Purpose of Trip	6
Trip Characteristics of FALL Visitors: All Visitors and by Purpose of Trip	9
Chapter 3: Summary	14
Group Size/Length of Stay	14
Travel Patterns	14
Satisfaction and Changes Observed	15
Traveler Demographic and Trip Characteristics	15
Vacationers	16
VFR	16
Passing Through	17
Discussion	18
Travel Behavior Analysis	18
Marketing	18
Program Development	19
Future research	19

## List of Tables

### All Visitors

Table 1: Percent of Overnight Stays for Selected Communities.....	4
Table 2: Percent of Nonresidents on Specific Highway Segments.....	5

### Trip Satisfaction and Changes Noted by Fall Visitors

Table 3: Satisfaction with Montana Conditions.....	6
Table 4: Changes Seen Over Time by Returning Visitors.....	6

### Demographic Characteristics of Fall Visitors: All visitors and by Purpose of Trip

Table 5: Reasons for Visiting Montana in the Fall.....	6
Table 6: Demographic Comparison of All Fall Travel Groups and Those Categorized by Primary Reason for Visiting Montana.....	7
Table 7: Visitors Place of Residence.....	8

### Trip Characteristics of Fall Visitors: All Visitors and by Purpose of Trip

Table 8: General Trip Behavior .....	9
Table 9: Accommodations.....	9
Table 10: Fall Attractions to Montana for those who Indicated Vacation as One Reason for trip.....	10
Table 11: Sites Visited While in Montana over the Years .....	11
Table 12: Sources of Information Used to Plan Trip .....	11
Table 13: Source of Information Used While in Montana.....	11
Table 14: Activities Participated in While in Montana on this Trip.....	14
Table 15: Comments by all Visitors.....	15

## Acknowledgements

This study could not have been completed without the cooperation of many people around the state of Montana and the many visitors who endorsed our study by answering our many questions. We are forever indebted to the wonderful visitors who spent their trip time filling out the questionnaire and mailing it back to ITRR.

A study of this magnitude has many employees who put their heart and soul into the project. The fall surveyors, Todd Easton on the west side of the state and Jim Hartung on the east side of the state, spent 40 hours each week talking to visitors, who, despite the terrorist attacks on New York and Washington, D.C. on September 11, were still out enjoying what Montana has to offer.

In addition to the "in-the-field" surveyors, other workers on the fall study included Holly Praytor, Clint Cook, Jill Sanderson, and Bethany Sutton. These individuals were responsible for coding and organizing all the returned surveys.

Because of the terrorist attacks, restrictions at the airports were tight and surveying nonresidents at the airports became a challenge. The Institute for Tourism & Recreation Research did not survey at the airports for one month following September 11. After that, surveys were conducted at airports who were willing to give us special permission. Special thanks goes to Monte Eliason for his insistence that our surveys continue at the Kalispell airport. Also, to the airline personnel in Bozeman who gave special permission to our surveyors. Finally, with a little change in our techniques, we were able to survey at the remaining airports.

A final, thanks go out to the customs and immigration officials at the northern borders of Montana. These folks had an increased security challenge after September 11 but were able to allow our survey to continue at the border. Last but not least, a big thanks to all the gas station/convenience store owners/managers who allowed our surveyors to talk to their customers. Without the cooperation of these business people throughout the state, this study could not have been completed.

## Executive Summary

### Nonresident Fall Travelers to Montana: 2001

- During the two-month study period of October and November, 2001, 853 nonresident visitors were intercepted at gas stations, rest areas, and airports. Questionnaires were handed to 763 groups with a resulting 34% response rate.
- Fall visitors came to Montana in group sizes of 2.03 and spent 3.94 nights in the state. When comparing length of stay by purpose of trip, those visiting friends and relatives spent the greatest amount of time (6.57 nights), followed by vacationers (4.98 nights). Those passing through Montana only stayed 1.47 nights in the state.
- Travel patterns of fall visitors generally followed the Interstates. On the east-west corridors, between 20 and 46 percent of all nonresidents traveled Interstate 90. The most heavily traveled section of Interstate 90 was between Livingston and Billings (42%-46% of visitors traveled this section). The most heavily traveled section on I-94 was between Miles City and Glendive with 29 percent of all nonresident traffic. Interstate 15 was traveled by 17-18 percent in the segment between Dillon and the Idaho border with another 16 percent traveling between Butte and Dillon. Off the Interstate, 7 to 12 percent of the nonresidents traveled the north-south route of US191 between Belgrade and West Yellowstone. US89 between Livingston and Gardiner saw eight percent of the nonresident travel in the state.
- **Vacationers Profile:** Comprise 29% of fall visitors, stayed 4.98 nights, were traveling as couples (33%), alone or family (23% each). Fifteen percent were traveling with children under 18. When planning their trip to Montana, 38 percent of vacationers used the Internet but 55 percent said they did not use any of the sources named for planning. Vacationers were attracted to Montana's scenery such as mountains/forests (64%), open space (54%), and hunting (46%), followed by wildlife (45%) and Yellowstone National Park (42%). The *primary* attraction to Montana was hunting. Vacationers were more active than any of the other groups in Montana. Forty-three percent went hunting, 41 percent shopped, 36 percent watched wildlife, and 34 percent went fishing. Fifteen percent of all vacationers hired an outfitter or guide while in Montana. Eighty-four percent of fall vacationers had been to Montana in the past. Vacationers were more likely to come from Washington (13%), California (10%), North Dakota (7%), or Minnesota, Oregon, Idaho and Alberta (5% each). Fall vacationers have a high income: 39 percent indicated an income of greater than \$100,000 per year whereas in the next largest group, 18 percent had an income of \$40,00-\$60,000. Fourteen percent had an income between \$80,000 and \$100,000. Vacationer nights were spent in motel-type accommodations 56 percent of the time and in homes of friends and relatives 23 percent of the time.
- **Visiting Friend & Relatives (VFR) Profile:** Comprise 23 percent of fall visitors, stayed 6.57 nights, were traveling as a couple (46%), traveling as a family (29%), or alone (23%). Sixteen percent of families were traveling with children under 18. Seventy-four percent did not use any information sources to plan their trip. If an information source was used, 20 percent used the Internet. Ninety-seven percent of VFR visitors had been to Montana in the past and 48 percent had even lived here previously. These visitors have been to Montana in every season with winter attracting 57 percent of the visitors and summer attracting 77 percent of the visitors in previous visits. More VFR visitors spent time shopping while in Montana than participating in any other activity (44%). This was followed by visitors day hiking (32%) and watching wildlife (24%). Almost one-fifth of the VFR group visited museums (18%) while in Montana. VFR visitors came from Washington (14%), then Idaho (12%), Oregon (7%), North Dakota and Wyoming (6% each). VFR visitors generally have a lower annual income than vacationers: the largest segment (36%) earns only \$20-40,000 per year. However, a significant number of VFR visitors (24%) earn over \$100,000 per year. Sixty-five percent of VFR visitor nights were spent in private homes of friends/relatives, followed by 27 percent of nights spent in hotel/motel/B&Bs.
- **Passing Through Profile:** Comprise 34% of all fall visitors, stayed 1.47 nights, were traveling as couples (57%), family (19%), or alone (14%). Sixty-seven percent of their nights were spent in a hotel/motel/B&B. Eighteen percent went shopping, 13 percent watched wildlife, and 11 percent camped.
- Three types of groups emerge from these data:
  1. Travelers visiting friends and relatives who want to shop;
  2. Travelers who are here for hunting, and;
  3. Travelers who are here on vacation and watch wildlife.

- The hunting market provides an additional opportunity for Travel Montana and Montana Fish, Wildlife and Parks to work together. The idea for Travel Montana to “sell” the hunting idea should be investigated.
- Wildlife watching should be a focus for at least a three-season, if not full-year, niche market campaign since this activity is done by many visitors throughout the year.
- Fall visitors are repeat visitors (89%) and 94 percent said they will return in the next two years. Twenty-seven percent of fall visitors have lived in Montana at some point in the past. This strong connection to Montana suggests that, in terms of visitation, Montana is doing a lot of things right. It is important to evaluate what is drawing people to the state in the fall, and continue to provide what is desired (in this case, watchable wildlife, hunting and shopping opportunities).
- Most fall visitors did not use any information sources for planning their visit (57%). However, the Internet was still the most used source indicating that Travel Montana’s web site is the best place to focus promotional efforts.
- Service personnel and highway signs were the most influential sources of information when visitors were in the state. While billboards were used for information, they were not influential to the visitor.
- Visitors are overwhelmingly satisfied with conditions in Montana such as signage, hospitality, lodging availability, travel information, road information, the condition of the natural environment, and even availability of rest areas. Rest areas received the lowest number of satisfied ratings (65%).
- Repeat visitors reported that most aspects of Montana have not changed over time. Some conditions were improved upon, such as road conditions: 61 percent of visitors said this has improved over time. Fifty percent indicated that lodging availability improved.
- One aspect that appears to be worsening over time from the point of view of visitors who have been here in the past is “Amount of open space.” Twenty-six percent of fall visitors indicated that the amount of open space has decreased. Of all the changes over time, open space consistently received the highest percentage saying it had worsened.
- A repeat of the fall study should be conducted to increase the sample size and to determine if the effects of 9-11 made this fall visitor information different from the norm.

# Nonresident *Fall* Visitor Profile

## A Study of Fall Visitors to Montana

### Introduction

The purposes of this study were to assess characteristics of nonresident fall visitors to Montana, to determine fall travel patterns, and to update visitor estimation figures for the state of Montana. A fall visitor for this study is defined as a nonresident who traveled in Montana any time during the two fall months of October and November.

This fall report is one component of the year-round nonresident visitor study to Montana. The objectives of the year-round study were to:

- Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state.
- Determine the economic impact of travelers to Montana.
- Describe changes in visitor trends since the previous nonresident visitor study.
- Determine the main attractions to the state (including Lewis and Clark attractions).
- Update information used in ITRR's model to estimate annual visitation to the state and associated economic impacts.

It is speculated that the September 11 terrorist attacks created a psychological unknown of what was happening to the nation which, in turn, may have affected trust and therefore response rates of surveys. In the end, the response numbers for expenditures and subsequent economic impact of visitors in the fall did not produce a large enough sample size for data analysis. Therefore, this report omits the expenditure portion of the analysis.

This report provides the profile of nonresident visitors to Montana in the fall. Visitors are analyzed and described according to the following categories:

- 1) All fall visitors are analyzed as one group.
- 2) The primary purpose for visiting Montana is analyzed and compared to other purposes.



## **Methodology**

### **Study Population**

Travelers to Montana during the fall of 2001 (October and November) were examined for this study. The population of travelers was defined as those persons who entered Montana by private vehicle or commercial air carrier during the study period and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons who entered Montana on a roadway while traveling in a plainly marked commercial vehicle (e.g. scheduled or chartered bus or a semi truck). Also excluded were those travelers who entered Montana by train, and out-of-state college students living in Montana for educational purposes (they were considered residents). Other than these exclusions, the study attempted to assess all types of travel to the state including travel for pleasure, business, passing through, or any other reason.

### **Population Estimation Model**

The population estimation model was designed to identify all members of the study population by entry location and month of entry into the state. Entry locations included highway border crossings and major airports. Thirty-nine roadway locations were considered entry points into the state (i.e., Interstates, primary and secondary highways, and minor roads), in addition to the following airports: Billings, Bozeman, Butte, Great Falls, Helena, Kalispell, and Missoula .

The method used to estimate the nonresident travel population was two-fold. First, traffic counts at all Montana borders/entry points were obtained from secondary sources for each month of the study. These sources include:

- Helena Regional Airport Authority: Monthly Passenger Deboarding Report by Airport.
- Montana Department of Transportation, Planning and Statistics Bureau: Monthly Comparative Automatic Traffic Recorder Data Report.
- Montana Department of Transportation, Planning and Statistics Bureau: Biannual Traffic by Sections Report.
- Idaho Transportation Department: Monthly Automatic Traffic Counter Bulletin.
- Wyoming Department of Transportation, Planning Program: Automatic Traffic Recorder Monthly Summary.
- North Dakota Department of Transportation, Planning Division: Monthly Automatic Traffic Data.
- The U.S. Department of Treasury, Customs Service: Monthly Canada-to-U.S. Border Crossing Statistics.

Second, surveyors identified resident/nonresident proportions at each entry location by observing vehicle license plates and questioning boarding air passengers at Montana airports using random sampling techniques stratified by location and time period. Travel group sizes were obtained while administering nonresident travel questionnaires to potential respondents.

### **Survey Methodology and Response Rates**

Between October 1, 2001 and November 30, 2001, ITRR staff intercepted nonresident highway travel groups at gas stations, rest areas, and Canadian border crossings, and air travel groups at most airports. Intercepts were conducted at three Canadian borders: Port of Roosville north of Eureka, Port of Sweetgrass north of Shelby, and Port of Raymond north of Plentywood. Gas stations in the following communities were used: Libby, Kalispell, Whitefish, West Glacier, St. Mary, Missoula, Lolo, Rocker, Butte, Dillon, Helena, Great Falls, Shelby, Bozeman, West Yellowstone, Livingston, Gardiner,

Lewistown, Harlowton, Laurel, Red Lodge, Bridger, Billings, Crow Agency, Miles City, Glendive, Sidney, Culbertson, Glasgow and Havre. Rest areas on all three Interstates were used as intercept locations in the Fall.

When contacted, data was collected from the travel groups, including point of entry into the state, group size and type, residence of the respondent as well as residence of others traveling in their group, travel method, purpose of trip, anticipated length of stay in Montana, direction of travel, and planned exit. This "front-end" data was obtained from virtually every party contacted and thus represented a set of data unaffected by survey non-response bias. Next, the groups were asked to accept and complete a diary questionnaire of their visit to Montana and to return it by mail in a provided postage-paid envelope. During the two-month study period, 853 groups were contacted. Questionnaires were handed to 763 groups. Useable questionnaires were returned by 258 groups for a response rate of 34 percent. No follow-up measures (i.e., reminder postcards or replacement questionnaires) were used to increase response rate. Due to the nature of the questionnaire (i.e. diary of events as they occurred) and the nature of the methodology (i.e. no name or address information was collected from visitors), it was impossible to mail replacement questionnaires to non-respondents.

Front-end data collected from all nonresidents contacted allowed adjustments of the survey results for non-response bias and sampling error. Returned surveys were assigned relative weights based on key variables to adjust for discrepancies within the population model. These key variables included point of entry and purpose of trip.

**Compared to the other three seasons of 2001, the two fall months represent the smallest sample size of all the seasons. Due to the small sample size, the fall report does not have as much data available to the reader. For example, visitor expenditures will not be reported. The sample size did not allow us to capture a variation in visitor spending needed for analysis. The chance of outliers (those truly high cost items or low cost items) could be represented as the real cost in any one particular category. This would affect the numbers and would severely skew our estimates beyond what is actually happening. In addition, the breakdown of the data by purpose of trip is difficult to analyze. Business travelers represent such a small number in this database that analysis of the business traveler had to be omitted. Also, some segments within each category are left blank as the sample size was too small.**

## Results

The results of the fall survey are presented in table format as much as possible in this section. Results will show all respondents in one column followed by a 'breakdown' of the data by primary reason for visiting. **Throughout the report, numbers that appear in bold represent one or two of the highest percentages for that column and sometimes the lowest number.**

### ALL visitors

The total number of fall groups was 432,827 representing 11 percent of the total nonresident visitation to Montana. Visitor group size averaged 2.03 people who spent, on average, 3.94 nights in Montana.

**Table 1: Percent of Overnight Stays for Selected Communities**

Region	City/Location	% Of all overnights within region	% Of all overnights within state
<b>Yellowstone Country (30%)</b>	<b>West Yellowstone</b>	<b>22%</b>	<b>7%</b>
	<b>Bozeman</b>	<b>22%</b>	<b>7%</b>
	<b>Gardiner</b>	<b>22%</b>	<b>7%</b>
	Livingston	20%	6%
<b>Glacier Country (22%)</b>	<b>Missoula</b>	<b>43%</b>	<b>10%</b>
	Whitefish	10%	2%
	Columbia Falls	10%	4%
	Kalispell	8%	2%
<b>Custer Country (22%)</b>	<b>Billings</b>	<b>33%</b>	<b>7%</b>
	Glendive	15%	3%
	Miles City	7%	2%
<b>Gold West Country (18%)</b>	<b>Helena</b>	<b>42%</b>	<b>8%</b>
	Butte	22%	4%
	Dillon	12%	2%
<b>Russell Country (5%)</b>	<b>Great Falls</b>	<b>55%</b>	<b>3%</b>
	Havre	20%	1%
<b>Missouri River Country (3%)</b>	Sidney/Fairview	<b>40%</b>	1%
	Glasgow	20%	-

**Table 2: Percent of Nonresidents on Specific Highway Segments\***

WEST-EAST		All Travelers	NORTH-SOUTH		All Travelers
<b>I-90</b>	ID Border to Missoula	33-34%	<b>I-15</b>	Canada to Shelby	9%
	Missoula to Butte	36-42%		Shelby to Great Falls	7-8%
	Butte to Bozeman	36-40%		Great Falls to Helena	7-8%
	Bozeman to Livingston	43%		Helena to Butte	9-10%
	Livingston to Billings	<b>42-46%</b>		Butte to Dillon	16%
	Billings to WY Border	20-24%		Dillon to ID Border	<b>17-18%</b>
<b>I-94</b>	Billings to Miles City	27-29%	<b>US93</b>	Kalispell to Polson	2-3%
	Miles City to Glendive	<b>29%</b>		Polson to Missoula	<b>4-5%</b>
	Glendive to ND Border	17-18%		Missoula to ID Border	1-5%
<b>US2</b>	Kalispell to W. Glacier	<b>4-5%</b>	<b>US191</b>	Belgrade to Big Sky	<b>7-12%</b>
	W. Glacier to Shelby	3%		Big Sky to W. Yellowstone	<b>9-11%</b>
	Shelby to Glasgow	3%	<b>US89</b>	Livingston to Gardiner	<b>8%</b>
	Glasgow to ND Border	2-3%			
<b>MT200</b>	G.Falls to Hwy 87 Jct.	1-4%			
	Hwy 87 to ND Border	.2-10%			
<b>US12</b>	Helena to Townsend	<b>2%</b>			
<b>US212</b>	Red Lodge to Laurel	<b>.2-5%</b>			
	I90 Jct. to Broadus/WY	3%			
<b>US310</b>	Rockvale to WY Bord.	<b>2-5%</b>			
Going-to-the-Sun Road		<b>2%</b>			

\*Not all respondents answered the travel route portion of the survey since it required tracing their route on a provided map.

\*\*The ranges represent more than one road segment between the two points highlighted, e.g. the stretch of road between the Idaho border to Missoula has adjoining roads where travelers could access or leave this stretch before arriving in Missoula. The ranges show the highest and lowest numbers on this portion of the road.

## Trip Satisfaction and Changes Noted by Fall Visitors

**Table 3: Satisfaction with Montana Conditions (Fall Visitor)**

Total number of responses per statement ranged from 187-223	Mean*	% Satisfied	% Neutral	% Dissatisfied
Road Conditions	1.20	85%	11%	5%***
Directional Signage	1.22	84%	11%	5%
Hospitality & Service	<b>1.11**</b>	<b>90%</b>	10%	1%
Commercial Lodging Availability	1.17	85%	13%	2%
Availability of Highway Rest Areas	<b>1.49</b>	<b>65%</b>	22%	<b>14%</b>
Condition of Natural Environment	1.16	88%	<b>7%</b>	5%
Amount of Roadside Historical Information	1.35	69%	<b>28%</b>	4%
Availability of Travel Information	1.30	72%	26%	2%

\*1=Satisfied, 2=Neutral, 3=Dissatisfied

\*\*Bold items represent the highest and lowest score on these questions

\*\*\*Percentages in the rows may not add to 100% due to rounding

**Table 4: Changes Seen Over Time by Returning Visitors (Fall Visitor)**

Total number of responses per statement ranged from 163-187	Mean*	% Better	% Same	% Worse
Road Conditions	<b>1.42**</b>	<b>61%</b>	<b>36%</b>	3%***
Directional Signage	1.77	24%	74%	1%
Hospitality & Service	1.74	28%	70%	2%
Commercial Lodging Availability	1.55	50%	46%	5%
Availability of Highway Rest Areas	1.79	26%	69%	5%
Condition of Natural Environment	1.87	24%	66%	10%
Amount of Roadside Historical Information	1.74	27%	73%	1%
Availability of Travel Information	1.69	31%	69%	-
Amount of Wildlife Viewing Opportunities	1.93	15%	<b>76%</b>	9%
Recreation Opportunities	1.72	32%	65%	4%
Amount of Open Space	<b>2.14</b>	<b>11%</b>	64%	<b>26%</b>
Camping Availability	1.84	21%	75%	5%

\*1=better condition, 2=same condition, 3=worse condition

\*\*Bold items represent the highest and lowest score on these questions per column

\*\*\* Percentages in the rows may not add to 100% due to rounding.

## Demographic Characteristics of FALL Visitors: All visitors and by Purpose of Trip

**Table 5: Reasons for Visiting Montana in the Fall**

	All Reasons	Primary Reason*
Passing Through	37%	<b>34%</b>
Vacation	<b>44%</b>	29%
Visit Family & Friends (VFR)	37%	23%
Business	13%	7%
Shopping	12%	4%
Other	8%	4%

\*Percentages may not add up to 100% due to rounding.

**Table 6: Demographic Comparison of All Fall Travel Groups and Those Categorized by Primary Reason for Visiting Montana**

Travelers		ALL TRAVELERS	Vacation (29%)	Visit Friends/ Relatives (23%)	Passing Through (34%)
Travel Group Type	Couple	42%	33%	46%	57%
	Self	24%	23%	23%	14%
	Family	21%	23%	29%	19%
	Family/Friends	1%	2%	-	-
	Friends	8%	17%	1%	5%
	Bus. Assoc.	4%	3%	-	6%
	Org. Group	-	-	-	-
Lived in MT Before?	Yes	27%	24%	48%	15%
Visited MT Before?	Yes	89%	84%	97%	86%
Number of visits in past 10 years	1	7%	5%	11%	6%
	2	14%	29%	11%	8%
	3	4%	2%	-	5%
	4	6%	2%	3%	13%
	5	7%	8%	10%	11%
	6-10	22%	29%	15%	19%
	11-20	19%	8%	24%	30%
	21+	22%	19%	27%	8%
Seasons Visited Before	Spring	46%	30%	60%	47%
	Summer	63%	48%	77%	54%
	Fall	77%	69%	76%	85%
	Winter	41%	32%	57%	27%
Traveling with Children	Yes	10%	15%	16%	9%
Children's influence in planning	No Influence	49%	36%	50%	63%
	Some Influence	49%	65%	50%	37%
	Great Influence	3%	-	-	-
Children's influence in activities	No influence	23%	7%	-	63%
	Some Influence	65%	93%	73%	37%
	Great Influence	12%	-	27%	-
Travelers		ALL TRAVELERS	Vacation (29%)	VFR (23%)	Passing Through (34%)
Household Income	Less than \$20K	7%	9%	7%	4%
	\$20K-\$39,999	22%	9%	36%	23%
	\$40K-\$59,999	26%	18%	17%	33%
	\$60K-\$79,999	11%	11%	9%	13%
	\$80K-\$99,999	10%	14%	8%	10%
	\$100,000+	24%	39%	24%	18%

\* Percentages may not add to 100% due to rounding.

**Table 7: Visitors Place of Residence\***

Travelers	All Travelers		Vacation (29%)		Visit friends/ Relatives (23%)		Passing Through (34%)	
Place of Residence	WA:	14%	WA:	13%	WA:	14%	WA:	18%
	ID:	10%	CA:	10%	ID:	12%	ID:	13%
	ND:	8%	ND:	7%	OR:	7%	ALB:	12%
	WY, ALB:	7%	MN, ALB, OR, ID:	5%	ND, WY	6%	CA, MN, WY:	5%
	CA:	6%	ONT, MI, NV:	4%	MN, UT:	5%	ND:	4%
	MN, UT	5%	CO, UT, WY:	3%	TX; ALB:	3%	OR,BC:	3%
	OR:	4%	Other Canada: 4%	SASK:			2%	
	CO, TX	3%		Other Canada:			2%	
	MI, NV, PN	2%						
	Other Canada	2%						

\*Place of residence was calculated from the front-end population database (N=853) rather than the sample survey to better represent Canadian and foreign visitors.

## Trip Characteristics of **FALL** Visitors: All Visitors and by Purpose of Trip

**Table 8: General Trip Behavior**

Travelers		All Travelers	Vacation (29%)	Visit Friends/ Relatives (23%)	Passing Through (34%)
All Purposes of Trip	Vacation	44%	100%	34%	13%
	VFR	37%	35%	100%	17%
	Passing Thru	37%	14%	3%	100%
	Business	13%	3%	5%	7%
	Shopping	12%	13%	20%	1%
	Other**	8%	1%	7%	1%
Plan to visit in next 2 yrs.	Yes	94%	95%	96%	96%
Flew on portion of trip	Yes	11%	13%	9%	1%
Rent Auto	Yes	11%	21%	-	-
Hired Outfitter	Yes	5%	15%	1%	-

\* Percentages may not add to 100% due to rounding.

\*\*Refers to trips for medical purposes, weddings, funerals, college visits, etc.

**Table 9: Accommodations**

Travelers		All Travelers	Vacation (29%)	Visit Friends/ Relatives (23%)	Passing Through (34%)
Nights in MT on this trip		3.94	4.98	6.57	1.47
If Overnight in MT, Percent of Nights Spent in Accommodation Types	Hotel/motel/B&B	51%	56%	27%	67%
	Parking lot	2%	-	-	15%
	Cabin/2 <sup>nd</sup> Home	9%	5%	8%	-
	Public Campgr.	4%	6%	1%	5%
	Private Campgr.	2%	1%	-	11%
	VFR Home	28%	23%	65%	2%
	Rented Cabin	<1%	1%	-	-
	Resort/Condo	3%	7%	-	-
	Guest Ranch	1%	1%	-	-
	Other	1%	-	-	-

\* Percentages may not add to 100% due to rounding.



**Table 10: Fall Attractions To Montana for Those who Indicated Vacation as One Reason for Trip**

	All Travelers		Vacation (29%)		VFR (23%)		Pass Thru (34%)	
	All	Primary	All	Primary	All	Primary	All	Primary
<b>Open Space/ Uncrowded Areas</b>	<b>22%</b>	<b>20%</b>	<b>54%</b>	<b>25%</b>	<b>9%</b>	11%	5%	1%
<b>Mountains/forests</b>	<b>25%</b>	7%	<b>64%</b>	7%	<b>9%</b>	-	<b>9%</b>	<b>4%</b>
<b>Rivers/lakes</b>	10%	-	19%	-	7%	-	2%	-
<b>Plains/Badlands</b>	4%	-	14%	-	1%	-	-	-
<b>Native Am. Culture</b>	1%	-	2%	-		-	-	-
<b>Lewis &amp; Clark sites</b>	6%	-	12%	-	5%	-	2%	-
<b>Montana History</b>	2%	1%	2%	-	1%	-	1%	-
<b>Family/friends</b>	10%	12%	10%	2%	<b>28%</b>	<b>77%</b>	5%	1%
<b>Glacier NP</b>	9%	7%	26%	10%	4%	4%	1%	-
<b>Yellowstone NP</b>	<b>17%</b>	5%	<b>42%</b>	1%	8%	-	3%	-
<b>Wildlife</b>	<b>17%</b>	2%	<b>45%</b>	-	6%	-	1%	-
<b>Camping</b>	5%	<1%	4%	-	3%	-	<b>8%</b>	1%
<b>Fishing</b>	9%	1%	22%	-	4%	4%	3%	-
<b>Hiking</b>	4%	-	5%	<1%	<1%	-	3%	-
<b>Hunting</b>	<b>17%</b>	<b>15%</b>	<b>46%</b>	<b>43%</b>	4%	1%	3%	3%
<b>Other Activity</b>	3%	1%	1%	-	4%	4%	5%	2%
<b>Special Event</b>	4%	3%	10%	10%	4%	-	-	-

\* Percentages may not add to 100% due to rounding.

**Table 11: Sites Visited by Travelers in Montana Over the Years**

	<b>All Travelers</b>	<b>Vacation (29%)</b>	<b>VFR (23%)</b>	<b>Passing Through (34%)</b>
<b>Glacier National Park</b>	<b>11%</b>	<b>24%</b>	<b>3%</b>	<b>2%</b>
<b>Yellowstone National Park</b>	<b>23%</b>	<b>38%</b>	<b>21%</b>	<b>12%</b>
<b>Little Bighorn Battlefield</b>	9%	12%	8%	4%
<b>Fort Peck Lake</b>	4%	5%	-	-
<b>National Bison Range</b>	3%	7%	1%	-
<b>Flathead Lake Area</b>	12%	17%	4%	4%
<b>Clark Canyon Reservoir</b>	<1%	-	-	-
<b>Gates of the Mountains</b>	4%	5%	1%	1%
<b>Lost Trail Pass</b>	1%	4%	-	-
<b>Bighorn Canyon Nat'l Rec. Area</b>	2%	2%	1%	1%
<b>Museum of the Rockies</b>	3%	-	5%	3%
<b>Lewis &amp; Clark Interpretive Center</b>	4%	3%	1%	3%
<b>Montana Historical Society</b>	3%	-	6%	-
<b>Pompey's Pillar</b>	5%	7%	3%	3%
<b>Missouri Headwaters</b>	3%	7%	6%	-
<b>Lemhi Pass</b>	<1%	-	-	-
<b>CM Russell Nat'l Wildlife Refuge</b>	2%	5%	<1%	1%
<b>Lolo Pass Interpretive Center</b>	2%	6%	-	1%

**Table 12: Sources of Information Used to Plan Trip\***

	<b>All Travelers</b>		<b>Vacation (29%)</b>		<b>VFR (23%)</b>		<b>Pass Through (34%)</b>	
	<b>All items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>
<b>Internet</b>	<b>28%</b>	<b>61%</b>	<b>38%</b>	<b>89%</b>	<b>20%</b>	<b>70%</b>	<b>21%</b>	<b>36%</b>
<b>Auto Club</b>	13%	18%	4%	4%	9%	24%	23%	34%
<b>Travel Agency</b>	1%	2%	1%	-	<1%	1%	1%	3%
<b>Chamber/CVB</b>	3%	3%	<1%	-	5%	-	1%	-
<b>MT Travel Planner</b>	2%	4%	1%	3%	-	-	3%	6%
<b>Nat'l Park Brochure</b>	6%	2%	10%	-	1%	-	7%	6%
<b>1-800 state Number</b>	<1%	1%	-	-	-	-	-	-
<b>Guide Book</b>	5%	5%	6%	-	-	-	9%	11%
<b>Private Business</b>	5%	6%	2%	5%	1%	5%	6%	4%
<b>None of these Sources</b>	<b>57%</b>	-	<b>55%</b>	-	<b>74%</b>	-	<b>47%</b>	-

\* Percentages may not add to 100% due to rounding.

**Table 13: Sources of Information Used While in Montana\***

	<b>All Travelers</b>		<b>Vacation (29%)</b>		<b>VFR (23%)</b>		<b>Pass Through (34%)</b>	
	<b>All Items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>	<b>All Items</b>	<b>Most Useful</b>
<b>Info center person</b>	8%	8%	1%	2%	4%	2%	14%	11%
<b>Billboards</b>	11%	2%	22%	5%	5%	-	14%	-
<b>Highway Signs</b>	<b>24%</b>	<b>23%</b>	<b>23%</b>	<b>23%</b>	<b>26%</b>	<b>27%</b>	<b>31%</b>	<b>38%</b>
<b>Brochure Rack</b>	13%	5%	16%	7%	15%	13%	8%	-
<b>Service Person</b>	26%	<b>29%</b>	<b>28%</b>	<b>29%</b>	18%	<b>23%</b>	23%	<b>27%</b>
<b>None of these Sources</b>	<b>48%</b>	-	<b>48%</b>	-	<b>57%</b>	-	<b>41%</b>	-

\* Percentages may not add to 100% due to rounding.

**Table 14: Activities Participated in While in Montana on this Trip\***

	All Travelers		Vacation (29%)		VFR (23%)		Passing Through (34%)	
	All	Primary	All	Primary	All	Primary	All	Primary
<b>Picnicking</b>	8%	4%	5%	2%	6%	2%	6%	<b>18%</b>
<b>Camping (devlp.)</b>	7%	3%	11%	3%	-	-	10%	14%
<b>Camping (undeveloped)</b>	10%	6%	15%	5%	3%	2%	11%	<b>22%</b>
<b>Day Hiking</b>	16%	9%	22%	10%	<b>32%</b>	11%	3%	7%
<b>Golfing</b>	1%	1%	4%	1%	<1%	-	1%	2%
<b>Backpacking</b>	1%	2%	<1%	<1%	-	-	3%	7%
<b>Mountain Biking</b>	3%	2%	12%	5%	-	-	-	-
<b>Road/tour Biking</b>	1%	<1%	<1%	<1%	-	-	1%	-
<b>Off Highway/ATV</b>	2%	<1%	4%	<1%	-	-	-	-
<b>Fishing</b>	13%	5%	34%	6%	5%	4%	3%	-
<b>Motor boating</b>	1%	<1%	-	-	2%	1%	-	-
<b>Water-skiing</b>	<1%	-	-	-	-	-	-	-
<b>Canoe/Kayaking</b>	-	-	-	-	-	-	-	-
<b>Sail/Windsurf</b>	-	-	-	-	-	-	-	-
<b>Rafting/Floating</b>	2%	2%	3%	4%	-	-	-	-
<b>Nature Study</b>	2%	1%	1%	<1%	2%	1%	1%	6%
<b>Hunting</b>	17%	11%	<b>43%</b>	<b>16%</b>	12%	8%	-	-
<b>Wildlife watching</b>	<b>22%</b>	<b>11%</b>	<b>36%</b>	11%	24%	<b>14%</b>	<b>13%</b>	4%
<b>Sporting Event</b>	2%	2%	-	-	10%	7%	-	-
<b>Gambling</b>	5%	2%	3%	-	1%	1%	1%	2%
<b>Shopping</b>	<b>34%</b>	<b>21%</b>	<b>41%</b>	<b>19%</b>	<b>44%</b>	<b>26%</b>	<b>18%</b>	9%
<b>Visited Sites:</b>								
<b>Native American</b>	3%	1%	2%	1%	1%	1%	1%	2%
<b>Lewis &amp; Clark</b>	7%	4%	5%	2%	9%	6%	6%	2%
<b>Other History</b>	9%	5%	12%	2%	16%	12%	4%	3%
<b>Museums</b>	10%	3%	15%	3%	18%	3%	4%	2%
<b>Festivals/Events</b>	7%	5%	14%	8%	4%	3%	-	

\* Percentages may not add to 100% due to rounding.

**Table 15: Comments by All Visitors\***

	N
Montana has nice scenery	20
General positive comments	15
Have been here before	10
Rest Areas	9
Comments about specific sites	8
Openness/uncrowdedness of Montana	7
Specific suggestions	7
Montana has nice people	7
Would like to return	6
Prices	5
Stop developing/stay in original state of vegetation	5
Highways/roads	3
Lived or grew up in Montana	2
Miscellaneous	2
Would like to move to Montana	1
Passing through	1
Sales tax	1
Speed limit	1
Own property in Montana	1

\*These were responses to an open-ended request for comments submitted by respondents who chose to write in the space available on the survey

## Summary and Discussion

### Summary

Even though the sample size for fall is relatively small (258 respondents), highlights for marketing and program development can still be made. This section includes a discussion of what the results mean, and recommendations for marketing, program development, and further research. Recall that fall refers to the two months of October and November. The previous ITRR fall study in 1993 used three months for fall, (September, October, and November), and hence comparison over the years cannot be addressed.

#### Group Size/Length of Stay

On average, fall visitors come to Montana in group sizes of 2.03 and spent 3.94 nights in the state. When comparing length of stay by purpose of trip, those visiting friends and relatives spent the greatest amount of time (6.57 nights), followed by vacationers (4.98 nights). Those passing through Montana only stayed 1.47 nights in the state.

#### Travel Patterns

(Tables 1, 2, & 7)

Survey responses for this part of the questionnaire were slightly lower than other sections because this data is dependent on the visitor tracing their travel route on a small map of Montana. Some people chose to ignore the map or simply did not know how to read and trace on the map with comfort. Therefore, the responses on the map segments still represent basic traveler routes, but some inconsistencies may occur.

The majority of fall travelers in Montana traveled on the Interstates. The east-west/west-east interstate (I-90) saw more nonresident traffic than the north-south interstate (I-15). On the east-west corridors, between 20 and 46 percent of all nonresidents traveled Interstate 90. The most heavily traveled section of Interstate 90 was between Livingston and Billings (42%-46%). The most heavily traveled section on I-94 was between Miles City and Glendive with 29 percent of all nonresident traffic.

The most traveled north-south route was Interstate 15 where 17-18 percent traveled the segment between Dillon and the Idaho border with another 16 percent traveling between Butte and Dillon. Seven to 12 percent of the nonresidents traveled the north-south route of US191 between Belgrade and West Yellowstone. Finally, US89 between Livingston and Gardiner saw eight percent of the nonresident travel in the state.

Yellowstone Country Travel Region received the largest percent of overnight stays of all the travel regions in the state (30%), followed by Glacier Country and Custer Country with 22 percent each. Gold West Country received 18% while Russell Country had five percent of the overnights and Missouri River Country had three percent of the overnights. Missoula housed 43 percent of all overnights in Glacier Country, but 10 percent of the statewide overnight stays. Billings housed 33 percent of all overnights in Custer Country and seven percent of the statewide overnight visitation. West Yellowstone, Bozeman and Gardiner all received 22 percent of Yellowstone Country overnights and seven percent each for the

state. Helena housed 42 percent of all overnights in Gold West Country and eight percent of all statewide overnights. Finally, Great Falls housed 55 percent of all Russell Country overnights but only three percent of all statewide overnight stays.

Places of residence for visitors to Montana show that people who reside in our nearby states of Washington (14%), Idaho (10%), North Dakota (8%), Wyoming (7%) and Alberta (7%) come to Montana in greater percentages than any other state/province in the fall months. Nine percent of all visitors were from Canada and no overseas visitors were intercepted in Montana during the two fall months. This is more than likely due to the September 11 attacks that made traveling to America risky in the eyes of foreigners.

### **Satisfaction and Changes Observed**

(Tables 3 & 4)

Nonresidents were asked to rate their satisfaction with eight travel-related conditions they were likely to have encountered while in Montana. Responses were rated on a three-point scale where "1" was satisfied, "2" was neutral, and "3" was dissatisfied. The closer the mean to "1," the more satisfied the visitors. Nonresidents were satisfied with their experiences in Montana since all eight categories received a mean rating less than "2". Satisfaction with Montana's hospitality and service received the best rating with a mean of 1.11 and 90 percent of respondents indicating they were satisfied. This was followed by the condition of the natural environment which received the second highest ratings: 88 percent of all visitors said they were satisfied with Montana's natural environment (mean satisfaction level was 1.16). Availability of highway rest areas received the highest number of dissatisfied people: 14 percent, mean = 1.49. There were still a majority, however, who indicated satisfaction with rest areas (65%).

Visitors who had been to Montana in the past were asked to indicate whether certain aspects of Montana have changed over time. Since 89 percent of all fall visitors had visited the state on previous occasions, the comparisons included a significant sample of visitors. The change scale ranged from 1 to 3 with "1" indicating that things were better, "2" meaning things were the same, and "3" meaning things were worse. A score closer to "1" indicated an improvement, while a score closer to "3" indicated a worsening condition.

Most conditions rated by visitors received a "stayed the same" rating. On the "getting better" end of the spectrum, road conditions scored the highest: 61 percent said it was better. This was followed by the availability of commercial lodging with 50 percent indicating it was better, and 46 percent who said lodging availability had remained the same. In the "worsening" category a continuing trend is emerging from all travel seasons. In all three season reports (winter, spring, and summer), the aspect that appears to be worsening over time from the point of view of visitors who have been here in the past is "Amount of open space." Twenty-two percent of winter visitors, 18 percent of spring visitors, 22 percent of summer visitors, and 26 percent of fall visitors indicated that the amount of open space has decreased. Of all the changes over time, open space consistently received the highest percentage saying it had worsened. In summary, however, changes over time appear to be slight. The majority of visitors generally see that things have not changed much for the better or worse.

### **Traveler Demographic and Trip Characteristics**

(Tables 5-14)

Fall visitors to Montana have a variety of reasons for coming to the state. When asked to name all their purposes, vacation (44%) came out on top followed by passing through (37%), visiting friends and relatives (VFR) (37%), and business (13%). When asked to indicate the *primary* reason for visiting, passing through (34%) emerged as the primary reason but vacation was close behind with 29 percent and VFR at 23 percent. Business was only 7 percent when the primary reason was stated.

The remaining portion of the discussion will profile each group of visitor based on their primary reason for being in Montana.

#### Vacationers (29% of Fall Visitors – Averaged 4.98 nights in Montana)

Visitors in Montana for their fall vacation were more likely to be traveling as a couple than any other group type. Thirty-three percent of all vacationers were couples. This was followed by 23 percent who were traveling as a family or traveling alone. While 23 percent were families, only 15 percent were traveling with children under 18. Interestingly, 36 percent of the children did not have any influence on planning the vacation, though 93 percent had some influence over the activities the families did on the vacation.

When planning their trip to Montana, 38 percent of vacationers used the Internet but 55 percent said they did not use any of the sources indicated on the survey for planning. Eighty-nine percent who used the Internet said it was the most useful source of information. When asked to indicate sources of information used upon arrival in Montana, 48 percent of the vacationers didn't use any of the sources while 28 percent said service personnel were used for information followed by highway signs (23%). The service personnel were the most useful information source to the vacationer.

Vacationers were attracted to many aspects of Montana. Scenery such as mountains/forests (64%), open space (54%), and wildlife (45%) were at the top of the list followed by hunting (46%) and Yellowstone National Park (42%). When asked to pick a single *primary* attraction to Montana, hunting was by far the most cited reason (43%) followed by open space/uncrowded areas (25%).

Respondents were attracted mostly to the two national parks, Glacier and Yellowstone, followed by the Flathead Lake area and Little Bighorn Battlefield.

As expected, vacationers were more active than any of the other groups in Montana. Forty-three percent went hunting, 41 percent shopped, 36 percent watched wildlife, and 34 percent went fishing. Fifteen percent of all vacationers hired an outfitter or guide while in Montana. Hunting and shopping were the two primary activities by vacationers.

Eighty-four percent of fall vacationers had been to Montana in the past although 29 percent had only been to the state twice before this visit. Fall was the season these visitors had been to Montana over all other seasons (69%).

Vacationers were more likely to come from Washington(13%), California (10%), North Dakota (7%), or Minnesota, Oregon, Idaho and Alberta (5% each). Fall vacationers have a high income: 39 percent indicated an income of greater than \$100,000 per year, whereas the next largest group (18%), had an income of \$40,00-\$60,000. Fourteen percent had an income between \$80,000 and \$100,000.

Vacation was their primary reason for being in Montana, but 35 percent of vacationers were also visiting family/friends during their stay. Fourteen percent were also traveling through to vacation in other spots outside Montana. Ninety-five percent of the vacationers said they would return to Montana in the next two years.

Only 13 percent of vacationers flew on some portion of their vacation. Fifty-six percent of vacationer over nights were spent in hotel/motel/B&Bs while 23 percent were spent in homes of friends and relatives.

#### VFR (23% of Fall Visitors – Averaged 6.57 nights in Montana)

People in Montana to visit friends or relatives for their fall vacation were more likely to be traveling as a couple (46%) than any other travel group type. This was followed by 29 percent who were traveling as

a family. While 29 percent were families, only 16 percent of those groups were traveling with children under 18. Another 23 percent of the VFR group were traveling alone.

When planning their trip to visit friends/relatives in Montana, the majority did not use any travel information sources listed for planning their trip. Seventy-four percent were in this category. If a source of information was used, 20 percent used the Internet. In addition, while in Montana, 57 percent did not use any of the listed sources of information. Twenty-six percent, however, did use highway signs and 18 percent got information from service personnel. It is apparent that fall groups visiting friends and relatives do not rely on information for planning or during their visit. This is not surprising since 97 percent of these visitors had been to Montana in the past and 48 percent had even lived here previously. These visitors have been to Montana in every season, with winter attracting 57 percent of visitors and summer attracting 77 percent of visitors in previous visits.

The main attraction to Montana for the VFR group is obviously family and friends. While 11 percent said their primary attraction was open space/uncrowded areas, a full 77 percent indicated that family and friends were their primary attraction. Recall that the Thanksgiving holiday is reflected in the fall months and these two months immediately followed the September 11 terrorist attacks. These two events brought family closer together.

More VFR visitors spent time shopping in Montana (44%) than any other activity. This was followed by visitors day hiking (32%) and watching wildlife (24%). Almost one-fifth of the VFR group visited museums (18%) while in Montana.

The greatest segment of the VFR visitor currently lives in Washington (14%), then Idaho (12%) and Oregon (7%). Six percent came from North Dakota and Wyoming, while five percent each came from Minnesota and Utah. VFR visitors generally had less annual income than vacationers, with the largest segment (36%) earning only \$20-40,000 per year. However, a significant number of VFR visitors (24%) earn over \$100,000 per year. The large discrepancy in earned income is hard to explain and seems to be quite different from the other seasons.

VFR visitors were in Montana primarily to visit their friends/relatives, but 34% of them also said this was their vacation. Interestingly, 20% also indicated shopping as a purpose for their trip in Montana. This has not occurred in the other seasons and stands out as a "fall only" phenomenon.

In terms of travel behavior, only nine percent of VFR visitors flew on some portion of their vacation. In addition, 65 percent of VFR visitor nights were spent in private homes, however a significant number of nights were also spent in hotel/motel/B&Bs (27%).

#### Passing Through (34% of Fall Visitors – Averaged 1.47 nights in Montana)

This group of visitors, while a significant number (34% of all fall visitors) did not impact the state very much in terms of length of stay, activities, or sites visited. As suggested by their title, they are simply passing through the state. Twelve percent of the pass-through visitors visited Yellowstone National Park while only two percent visited Glacier National Park.

While a high 96 percent of visitors passing through the state do plan on returning to Montana, and 67 percent of their nights (which was only one night) was spent in a hotel/motel/B&B, they are not in the state long enough to be active. At the most, 18 percent went shopping, 13 percent watched wildlife, and 11 percent camped.



## Discussion

In this section we will discuss how this information about nonresident fall visitors could be used by marketers and decision makers, as well as where more research is needed. First, however, a short discussion of travel behavior following the September 11, 2001 Terrorist attacks is presented.

We remind the readers that this discussion is simply that – discussion related to the data. Program and marketing decisions are not within the realm of academic researchers whose role is to provide information. Researchers attempt to analyze and describe what the information means. Others should attempt to use the information to improve programs and make marketing decisions.

### Travel Behavior Analysis

After September 11, 2001, people's travel behavior could have changed. Obviously travel by air declined the most throughout the United States, but Montana is more dependent on automobile travel than air travel therefore, the effect of 9-11 was reduced. In fact, when looking at the travel patterns and activity patterns of fall visitors to Montana, nothing stands out as "out of the ordinary." The only problematic symptom appears to be in the response rate of visitors. The 34 percent response rate was the lowest of all four seasons. It is speculated that after September 11:

1. People were a little less trusting of strangers - a survey person is a stranger;
2. People were a little more preoccupied with their lives and their family, therefore, completing a survey was not important.

In terms of travel patterns, the interstate system remained the top travel corridor and the larger cities housed the most overnight visitors. This is mostly explained by the fact that the largest segment of visitors to Montana were simply passing through the state and with more services available in the larger communities, this was where they stayed.

### Marketing

Fall vacation visitors are an interesting travel group. The data showed they are either shoppers or outdoors people who hunt, fish, or watch wildlife. These four main activities accounted for the majority of all vacation activities. Wildlife watching and shopping were activities participated in by people visiting friends and relatives.

Hunters are not necessarily shoppers and vice versa, so a fall market campaign can be quite distinct. Recall that very few people (only 4%) are here specifically to shop. Therefore shopping is a secondary activity. However, those who were here primarily to visit family and friends indicated shopping as another purpose for their trip. With this in mind, it appears there are three types of marketable travelers:

- Travelers visiting friends and relatives who want to shop;
- Travelers who are here for hunting, and;
- Travelers who are here on vacation and watch wildlife.

With these three types of travelers in mind, marketing can be targeted to activity types. For example, the "Invite a friend" campaign should focus on what types of shopping are available in each of the main retail market areas of the state. Retail stores should be encouraged to co-op in the "Invite a friend" campaign. Montana does have shopping opportunities and VFR travelers should be targeted to shop.

The hunting market is another interesting market. It is recommended that Travel Montana and Montana Fish, Wildlife and Parks work together in regards to hunting. Montana FWP may be restricted in the number of out-of-state hunting licenses, so it is important for these two entities to work hand in hand. However, the ability of Travel Montana to "sell" the hunting idea should be investigated.

Finally, those travelers on vacation or visiting friends and relatives who watch wildlife can be another separate marketing campaign. Obviously watching wildlife in areas where hunting occurs should not be promoted. However, the national parks and wildlife refuges provide ample wildlife watching opportunities without the need to wear orange. Wildlife watching should be a focus for at least a three season, if not full-year market niche.

Like the other seasons, the most obvious marketing opportunity comes from the intent of visitors. When asked if they will return to Montana in the next two years, 94 percent of all visitors said yes. This included 95 percent of vacationers who indicated they would return in two years and 96 percent of VFR visitors with the same intentions. It is recommended that marketing to repeat visitors should be a regular program within Montana's promotion division, all travel regions and CVBs, as well as for private businesses throughout the state. It is evident that the Super-host program should continue. When visitors feel welcomed by residents, it encourages return visits. The highest satisfaction rating came in the hospitality and service category: 90 percent of all visitors said they were satisfied. In addition, it is recommended that marketers "go into the minds" of visitors and discover what it is that brings them back and then display those Montana characteristics prominently in advertising and promotional efforts on a continual basis.

In an effort to keep visitors returning each year, it is useful to know where they reside. Fall vacationers (the group marketers are really after) came from Washington and California, followed by North Dakota, Minnesota, Oregon, Idaho and Alberta. It might be strategically successful to take the current in-state tourism marketing campaign that encourages residents to visit their backyard and adjust it slightly to "infer" that Montana is another states' backyard which they should discover. With most fall visitors hailing from neighboring states, this campaign could be ideal.

With fall representing the two months of October and November, it is not recommended for promotional campaigns to delve into new markets. Currently Montana receives only 6 percent of visitors who have not been here before. These two months are not the time to encourage first-time visitors. It would probably cost a significant amount of money and achieve very little success.

Fall visitors, as mentioned, are repeat visitors to the state, so their need for travel information is rather limited. Of vacationers, fifty-five percent did not use any planning information source. However, of those who did use information sources, the Internet was used the most. As in all the recommendations from the other seasons, the continual updating of Travel Montana's web site is one of the best promotional efforts that division can undertake.

Marketing to visitors once they have arrived in the state is always a good strategy. About one-quarter of fall vacationers used service people for information, followed by billboards and highway signs. Most useful, however, was the service person and highway signs. Billboards do not appear to be an influential source of information for visitors.

### **Program Development**

The one program development idea that seems to emerge from the data set has already been touched upon – hunting. From a marketing standpoint, the opportunities seem endless. However, hunting rules and regulations are beyond the scope of a marketer and in the arena of planning and resource management. If an increase in out-of-state hunters is the goal of FWP, it is recommended that FWP and Travel Montana work jointly to develop a promotional campaign. This joint effort should include representatives from outfitters and guides who provide many of the services sought by hunters.

### **Future research**

The fall nonresident visitor study needs to be repeated to obtain a larger sample size. We could not analyze, with any degree of comfort, the expenditure pattern of the fall visitor. In addition, it is important to be able to compare the sample of visitors who came to Montana right after a catastrophic event (Sept.

11) with other fall visitors. If there is indeed a difference in the visitors, then this report does not represent the average fall visitor. We would be remiss to suggest marketing and program development ideas on an anomaly.

Hunting is an obvious activity engaged in by the fall visitor. If, promoting hunting becomes a state marketing strategy, it is imperative to further understand the hunter, his or her needs, and the demographic profile. It is recommended that a research study focused on the hunter be conducted.

As stated in the previous nonresident seasonal reports, there needs to be further exploration as to what is meant by "open space and uncrowded areas." Since this has been stated as an attraction to the state in all four seasons, now it is important to understand why these characteristics attract visitors. Is it just knowing open space is there and visible from the highway that attracts them, or do they recreate in these areas? Would visitors still come without the open space? Are uncrowded areas synonymous with open space, or is there a different meaning to the latter term? By further understanding the meaning of open space, we can determine the impact of the "worsening" condition of open space as stated by nonresidents in this survey.

---

## **Survey**



# 2001 Montana Nonresident Travel Survey

INSTRUCTIONS: MAKE DARK MARKS

• FILL IN COMPLETELY TO RECEIVE

• RETURN TO: MONTANA DEPARTMENT OF TOURISM

- 1) What are the purposes for your trip to Montana? (Please fill in circles for all that apply.)  
☒ 1 Visiting friends/relatives/family event ☒ 2 Shopping ☒ 3 Other
- 2) Of the items you marked above, please fill in the oval corresponding to your main purpose for visiting Montana. (Please fill in one oval.)  
☒ 1 (2) ☐ 3 ☐ 4 ☐ 5 ☐ 6
- 3) If you indicated vacation/recreation purposes in (1) above, what attracted you to Montana? (Please fill in circles for all that apply.)  
☒ 1 Scenic beauty ☒ 2 Family friends ☒ 3 Hunting  
☒ 4 Montana food ☒ 5 Warm weather ☒ 6 Snow skiing  
☒ 7 Northern Great Plains/Backcountry ☒ 8 Adventure/Recreation Park ☒ 9 Wildlife watching/conservation  
☒ 10 Cross-country skiing ☒ 11 Other ☒ 12 Fishing  
☒ 13 Snow & Ice activities ☒ 14 Other ☒ 15 Special event
- 4) Of the attractions you marked above, please fill in the oval corresponding to what attracted you most to Montana. (Please fill in one oval.)  
☒ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17 ☐ 18 ☐ 19 ☐ 20
- 5) What option below best describes your travel party? (Please fill in one oval.)  
☒ 1 Self ☐ 2 Couple ☐ 3 Family ☐ 4 Friends ☐ 5 Family & friends ☐ 6 Business associates ☐ 7 Organized group or club
- 6) Do you plan on visiting Montana again in the next 2 years? ☐ YES ☐ NO
- 7) Have you ever lived in Montana? ☐ YES ☐ NO
- 8) Did you fly on a commercial air carrier for any portion of this trip? ☐ YES ☐ NO

- 9) Did you rent an automobile for any portion of this trip? ☐ YES ☐ NO
- 9a) If yes, where was it rented? (Please fill in one oval.)  
☒ 1 Idaho ☐ 2 Oregon ☐ 3 Washington State ☐ 4 Alberta, Canada ☐ 5 British Columbia, Canada ☐ 6 Other
- 10) Did you hire an outfitter or outdoor guide for any portion of your trip in Montana? ☐ YES ☐ NO
- 11) How many total nights will your group be away from your permanent residence on this trip? Write the total number of nights with one digit in each box and fill in the corresponding oval below each digit.

1	0
2	1
3	2
4	3
5	4
6	5
7	6
8	7

9	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7

10	0
1	1
2	2
3	3
4	4
5	5
6	6
7	7

- 12) Prior to your visit, which of the following sources did you or someone in your travel group use to gather information for this trip? (Please fill in circles for all that apply.)  
☒ 1 Automobile club (e.g. AAA) ☒ 2 Montana Travel Planner ☒ 3 Travel agent  
☒ 4 Automobile club (e.g. AAA) ☒ 5 National Geographic ☒ 6 Travel agent  
☒ 7 Automobile club (e.g. AAA) ☒ 8 National Geographic ☒ 9 Travel agent  
☒ 10 Automobile club (e.g. AAA) ☒ 11 National Geographic ☒ 12 Travel agent  
☒ 13 Automobile club (e.g. AAA) ☒ 14 National Geographic ☒ 15 Travel agent
- 14) Of the information sources marked above, please fill in the oval corresponding to the most useful source of trip planning information.  
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☐ 13 ☐ 14 ☐ 15
- 15) While in Montana, where did you receive Montana travel information? (Please fill in circles for all that apply.)  
☒ 1 Automobile club (e.g. AAA) ☒ 2 Billboards ☒ 3 Brochure rack ☒ 4 None of these sources
- 16) Of the information sources marked above, please fill in the oval corresponding to the most useful source of information while in Montana.  
☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6



17) Please indicate the recreation activities in which any member of your travel group participated while in Montana. (Please do not tick all that apply.)

<input type="checkbox"/> Horseback riding	<input type="checkbox"/> Fishing (any kind)	<input type="checkbox"/> Game wading
<input type="checkbox"/> 1. Hunting (any kind)	<input type="checkbox"/> 2. Canoeing/kayaking	<input type="checkbox"/> 3. Camping
<input type="checkbox"/> 4. Hiking	<input type="checkbox"/> 5. Skiing/snowshoeing	<input type="checkbox"/> 6. Snowmobiling
<input type="checkbox"/> 7. Backpacking	<input type="checkbox"/> 8. Mountain biking	<input type="checkbox"/> 9. Off-roading (ATV, UTV)
<input type="checkbox"/> 10. Hunting (any kind)	<input type="checkbox"/> 11. Fishing (any kind)	<input type="checkbox"/> 12. Other (specify):

18) On the activities you marked in 17), please enter the corresponding number and tick in the oval below it for the three primary activities your group participated in while in Montana.



19) Please rate your overall satisfaction with the following conditions in Montana. (Please tick in one oval for each statement.)

1. Availability of scenic views	<input type="radio"/> 1 (Very Dissatisfied)	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5 (Very Satisfied)
2. Availability of wildlife viewing	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
3. Availability of hiking trails	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
4. Availability of off-road vehicle trails	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
5. Availability of snowmobile trails	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
6. Availability of campgrounds	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

20) Have you ever stayed in Montana before this trip? ☐ YES ☐ NO (If yes, please skip to question 24.)

21) If yes, how many nights in the past 10 years? (Please enter number.)  
☐ 1 night ☐ 2 nights ☐ 3 nights ☐ 4 nights ☐ 5 nights ☐ 6-10 nights ☐ 11-20 nights ☐ 21+ years

22) In what season have you stayed during the past 10 years? (Please tick in one oval for each season.)

☐ Spring ☐ Summer ☐ Fall ☐ Winter

23) Please indicate how your best Montana has changed over time for the following features. (Please tick in one oval for each feature.)

1. Natural resources	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
2. Scenic views	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
3. Wildlife viewing	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
4. Hiking trails	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
5. Off-road vehicle trails	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
6. Snowmobile trails	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse
7. Campgrounds	<input type="radio"/> Better <input type="radio"/> Same <input type="radio"/> Worse

24) Which of the following ideas have you or the group used for this trip in Montana? (Please tick in one oval for each idea.)

<input type="checkbox"/> 1. Visit scenic viewpoints	<input type="checkbox"/> 2. Visit historic sites	<input type="checkbox"/> 3. Visit national parks
<input type="checkbox"/> 4. Visit museums	<input type="checkbox"/> 5. Visit state parks	<input type="checkbox"/> 6. Visit local businesses
<input type="checkbox"/> 7. Visit local restaurants	<input type="checkbox"/> 8. Visit local shops	<input type="checkbox"/> 9. Visit local events
<input type="checkbox"/> 10. Visit local festivals	<input type="checkbox"/> 11. Visit local sports events	<input type="checkbox"/> 12. Visit local entertainment

25) Are you traveling with children under 18 years old? ☐ YES ☐ NO

If yes, how many did the children believe...  
 - the planning of this trip ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5  
 - what you did on this trip ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

26) What best describes your annual household income in US dollars? (Please tick in one oval.)

☐ Less than \$10,000 ☐ \$10,000 to \$19,999 ☐ \$20,000 to \$29,999 ☐ \$30,000 to \$39,999 ☐ \$40,000 to \$49,999 ☐ \$50,000 to \$59,999 ☐ \$60,000 to \$69,999 ☐ \$70,000 to \$79,999 ☐ \$80,000 to \$89,999 ☐ \$90,000 to \$99,999 ☐ \$100,000 or more

- 24) Please record all of your travel group's expenditures for the day of your trip indicated on the envelope accompanying this survey. Enter the amount and the town where you spent money during your visit in Montana. If you spent money in more than one Montana town, use a separate line for each place you spent money. Use the "Additional" category if the expenditure type does not match those listed.

Expenditure Type	Amount Spent on Assigned Day	Montana Town
<b>SAMPLE</b> Retail Goods <u>T-Shirts</u>	\$ <u>25.00</u>	<u>Helena</u>
Campground facility, RV hook		
Hotel, motel, bed & breakfast, etc.		
Gasoline, Oil		
Restaurant, Bar		
Coffee, Snacks		
Retail Goods		
Outdoor gear, outfitters		
Auto/RV Rental, Repair		
Transportation Fares		
Licenses, entrance fees		
Additional		

- 25) The above expenditures were for one day only. Now, to the best of your ability, please estimate the entire amount your travel group spent or will spend in Montana on this trip. Please include only those expenditures made in Montana. \$ \_\_\_\_\_

- 26) Please list the location (nearest town) and type of accommodation (from the list below) for your first eight nights spent in Montana.

Night	Town	Type	Accommodation Type Categories
1) <u>Bozeman</u>	<u>SAMPLE</u>	<u>A</u>	
2)			
3)			
4)			
5)			
6)			
7)			
8)			

- 27) In what U.S. state, Canadian province or foreign country do you permanently reside? \_\_\_\_\_

- 28) Please complete the map on back.

- 29) Please include any comments you may have: \_\_\_\_\_



- 30) On the map below, please trace your travel route through and around Montana. Use arrows ( $\rightarrow$ ) to indicate your direction of travel. Place an "E" to indicate where you entered Montana and an "X" to indicate your point of exit from the state. If you have entered, exited, and re-entered the state on this trip away from home, please include only the portion of your trip through Montana which begins with your most recent point of entry into the state and your next point of exit from the state.

